Managing Inventory

In this chapter:

The red type in the View Inventory screen indicates that a vaccine is inactive. A vaccine may be inactive for a number of reasons; the inventory for that vaccine's lot number may be used up,, the vaccines in that lot may be expired, or the vaccines in that lot may have been recalled.

Vaccines on the View Inventory screen that are highlighted in pink will expire within 30 days.

The inventory management function of VIIS is used to view, add, or update any vaccine in an organization's inventory. This function is designed to be a complete tracking system for a provider's vaccine inventory.

Inventory Alerts

The Inventory Alerts screen is displayed when you click on Manage Inventory under Inventory on the menu panel. The top table on this screen, Vaccine Order/Transfer Notification, updates you on the status of vaccine orders and transfers. The next table, Active Inventory That is Going to Expire, lists vaccines at each site that will expire within 30 days.

The bottom tables on the same screen list, by vaccine group and trade name, inventory that is nearly depleted.

Updating Inventory Alert Preferences

To change system options for expiration alerts and low inventory alerts, follow these steps:

1. Click on Manage Inventory under the Inventory section of the menu panel.
2. At the Inventory Alerts screen, press Update Alert Prefs .
3. In the Inventory Expiration Alerts section, enter the number of days prior to the expiration of the vaccine lot within which you wish to be notified.
4. To enter a low-level alert for all vaccine groups or trade names, select whether you wish to update the low-level alerts by trade name or by vaccine group in the Update Low-Level Alert Defaults section. Then enter the number of doses at which VIIS will indicate that the inventory is running low.
5. To update VIIS's low-level alerts for each vaccine group, enter the number of doses that will indicate that the inventory is running low for each vaccine group listed. You may enter the number in either the combined column (indicating for both public and private sources), the public column, or the private column.
6. To update VIIS's low-level alerts for each vaccine trade name, do the following:
   - Click on the desired vaccine group name, which appears underlined and in blue.
   - Enter the number of doses that will indicate that the inventory is running low for each trade name listed on the Update Low-Level

Alerts by Trade Name screen. You may enter the number in either the combined column (indicating for both public and private sources), the public column, or the private column.

- Press Save.

7. Press Save. If the new preferences were saved successfully, the message "Updated Alert Preferences" will appear at the top of the screen.
8. To restore all inventory alerts to VIIS system defaults, press ***Reset to Default***. Press OK.
9. To return to the Manage Inventory screen, press ***cancel.***

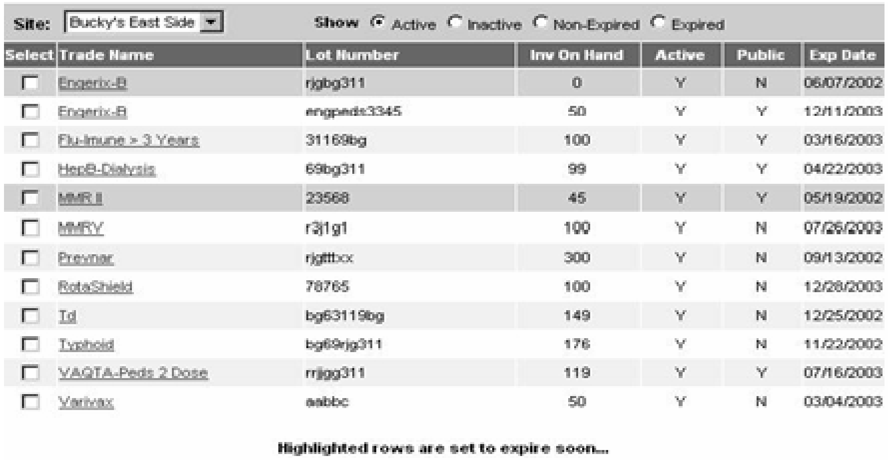
Viewing Inventory

To view the vaccine inventory at a particular site, follow these steps:

1. Click on Manage Inventory under the Inventory section of the menu panel.
2. At the Inventory Alerts screen, press Show Inventory.
3. The inventory table shown by default will include vaccines from one site within the organization and will include non-expired active and inactive vaccines. Following is a description of all options available:
   - Active: Select the 'Active' option to view only those vaccine lots that have valid (non-expired) doses remaining in the site's inventory.
   - Inactive: Select the 'Inactive' option to view only those vaccine lots that have either no remaining doses or have expired.
   - Non-Expired: Select the 'Non-Expired' option to view any active or inactive inventory that has not yet expired.
   - Expired: Select the 'Expired' option to view any inventory that has expired.

   To view inventory at a different site, view active or inactive vaccines only, or view expired vaccines:

   - Select the site name from the Site pick list.
   - If desired, choose Active or Inactive by clicking on the appropriate radio button.
   - If desired, choose Expired by clicking the appropriate radio button.



Site: Bucky's East Side

Show: Active / Inactive / Non-Expired / Expired

Select	Trade Name	Lot Number	Inv On Hand	Active	Public	Exp Date
	Engerix-B	rjgbg311	0	Y	N	06/07/2002
	Engerix-B	engpeds3345	50	Y	Y	12/11/2003
	Flu-Imune > 3 Years	31169bg	100	Y	Y	03/16/2003
	HepB-Dialysis	69bg311	99	Y	Y	04/22/2003
	MMR II	23568	45	Y	Y	05/19/2002
	MMRV	r3j1g1	100	Y	N	07/26/2003
	Prevnar	rjgtttxx	300	Y	N	09/13/2002
	RotaShield	78765	100	Y	N	12/28/2003
	Td	bg63119bg	149	Y	N	12/25/2002
	Typhoid	bg69rjg311	176	Y	N	11/22/2002
	VAQTA-Peds 2 Dose	rrjjgg311	119	Y	Y	07/16/2003
	Varivax	aabbc	50	Y	N	03/04/2003

Highlighted rows are set to expire soon...

The following is an explanation of the columns in the inventory table:

Select:	A mark in this checkbox allows you to modify the quantity of the selected vaccine.
Trade Name:	This column lists the vaccine's trade name.
Lot Number:	This column lists the lot number of the vaccine.
Doses On Hand:	This column lists the number of doses remaining in the site's inventory.
Active:	A "Y" in this column indicates the inventory is active (available for use). An "N" indicates the vaccine is inactive (unavailable for use because either the vaccine lot does not have any doses remaining in inventory, the vaccine lot has expired or the vaccine lot was set to inactive by a user). Inactive vaccines are shown in red type.
Public:	A "Y" in this column indicates the vaccine was state-supplied. An "N" indicates that the vaccine was privately purchased.
Exp Date:	This column gives the vaccine's expiration date. Vaccines that will expire in thirty days or less are highlighted in pink.

Printing Inventory

To print out a list of inventory at a particular site, follow these steps:

1. Follow Steps 1-3 under *Viewing Inventory*.
2. Click anywhere on the page.
3. Do one of the following:
   - Choose File, then Print, from your browser's menu bar. In the Print dialog box, press OK.

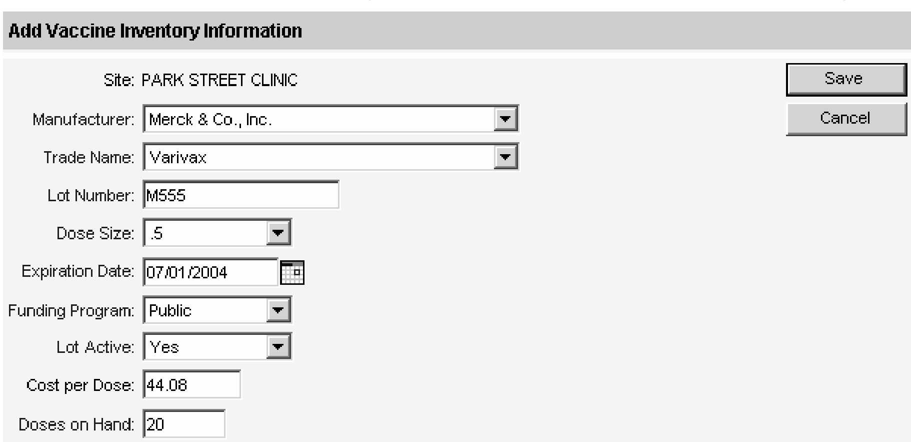
- Or press the printer icon on your browser’s toolbar.

4. If your printout is cut off, try setting your printer to landscape. To do this:
   - Choose File, then Print, from your browser’s menu bar.
   - In the Print dialog box, press Properties.
   - In the Properties box, find the section where you may specify orientation. Choose landscape.
   - Press OK.
   - Press OK in the Print dialog box.

Adding New Inventory

Use the Add Vaccine function only if you are adding a vaccine with a *new* lot number. If you are adding a vaccine with a lot number that already exists in your inventory, refer to *Updating Inventory*.

1. Click on Manage Inventory under the Inventory section of the menu panel.
2. At the Inventory Alerts screen, press Show Inventory.
3. At the next screen, choose the site to which you will be adding inventory from the Site pick list.
4. Press Add Inventory.
5. At the Add Vaccine Inventory Information screen, do the following:



   - Verify that the site at which the inventory will be located is listed under Site.
   - Choose the vaccine’s trade name from the pick list provided. By selecting the radio button next to the trade name pick list rather than by the manufacturer pick list, all possible trade names will populate the list. Once you have selected a trade

name, the manufacturer pick list will be populated with only those manufacturers that make the selected trade name.

- Choose the vaccine's manufacturer from the pick list provided. By selecting the radio button next to the manufacturer pick list rather than by the trade name pick list, all possible manufacturer name will populate the list. Once you have a selected a manufacturer, the trade name pick list will be populated with only those trade names made by the selected manufacturer.
- Enter the lot number of the vaccine in the Lot Number text box.
- Choose the dose from the Dose Size pick list; choose .25, .5 or 1 ml.
- Enter the vaccine lot's expiration date. Fill in the field using the MM/DD/YYYY format, or use the pop-up calendar by clicking the calendar icon to the right of the field. Then choose a month and year from the pick lists at the top and choose a day by clicking on the appropriate calendar day. Press OK. If no day is specified on the vaccine, enter the last day of the month.
- Choose the source of funding (public or private) used for the purchase of the vaccine from the pick list.
- Choose Yes from the Lot Active pick list. When adding new inventory, the lot may only be entered as active. This controls whether the lot shows up on pick lists.
- Enter the number of vaccine doses received in the Quantity on Hand text box.
- Enter the cost per dose of the vaccine, if desired, in the Cost Per Dose Field.

6. Press Save.
7. If the new vaccine was saved successfully, the message "Inventory was inserted successfully" will appear at the bottom of the screen.
8. To add additional vaccines, press Add New.
9. To return to the Show Inventory screen, press Cancel.

Updating Inventory

To change information on existing vaccines, follow these steps:

1. Click on Manage Inventory under the Inventory section of the menu panel.
2. At the Inventory Alerts screen, press Show Inventory.

3. The inventory table shown by default will include active vaccines from one site within the organization. Following is a description of inventory options available:
   - Active: Select the ‘Active’ option to view only those vaccine lots that have valid (non-expired) doses remaining in the site’s inventory.
   - Inactive: Select the ‘Inactive’ option to view only those vaccine lots that have either no remaining doses or have expired.
   - Non-Expired: Select the ‘Non-Expired’ option to view any active or inactive inventory that has not yet expired.
   - Expired: Select the ‘Expired’ option to view any inventory that has expired

   To view inventory for a different site and/or inactive vaccines only:
   - Select the site name from the Site pick list.
   - If desired, choose Active or Inactive by clicking on the appropriate radio button.
   - If desired, choose Expired by clicking the appropriate radio button.
4. Once the appropriate site's inventory displays, select the vaccine lot you wish to update by clicking on the vaccine's trade name, which is underlined and in blue.
5. On the next screen, make desired changes to the Manufacturer, Trade Name, Lot Number, Dose, Expiration Date, Funding Program, Lot Active, or Cost Per Dose fields for each vaccine lot. These fields may be edited only if the vaccine has not yet been administered.
6. To modify the quantity of doses on hand, enter the following information:

   - Under Action, choose whether you would like to add to or subtract from the inventory on hand.
   - Under Amount, enter the quantity of inventory to be added or subtracted.
   - Choose an explanation for changing the quantity of the vaccine lot by selecting from the Reason pick list.

Reasons for adding or subtracting inventory:

Receipt of inventory: Use this reason when you are adding new inventory to a particular lot.

Error correction: Use this reason when adding to or subtracting from inventory doses that were incorrectly entered or when getting extra or fewer doses from a vial.

Doses *returned:* Use this reason when adding inventory to a particular lot because vaccines were returned from another site.

Doses *transferred:* Use this reason when subtracting inventory that's been transferred to another site.

Doses wasted: Use this reason when inventory is subtracted because of broken vials, faulty injections, etc.

7. Press Save.
8. Once your updates are saved to the registry's database, the message "Inventory was updated successfully" will appear at the bottom of the screen.
9. Press Cancel to return to the Show Inventory screen.

Deleting Vaccine Lots

Vaccine lots may only be deleted if there are no immunizations, pending transfers, or transactions attached to the lot. To delete an entire vaccine lot from inventory, follow these steps:

1. Follow Steps 1-4 under Updating Inventory.
2. To delete the entire vaccine lot, press Delete
3. Press OK

Modifying Quantities of Multiple Vaccines

To change inventory quantities of multiple vaccine lots, follow these steps:

1. Follow Steps 1-3 under Updating Inventory.
2. Once the appropriate site's inventory displays, put a check mark next to the vaccine lots whose quantities you want to modify.
3. Press Modify Quantity.
4. On the Modify Doses on Hand screen, enter the following information:

- Under Action, choose whether you would like to add to or subtract from the inventory on hand.
- Under Amount, enter the quantity of inventory to be added or subtracted.
- Choose an explanation for changing the quantity of the vaccine lot by selecting from the Reason pick list. Refer to the list on the previous page for a description of the reasons for adding or subtracting inventory.
- Press Save.

Viewing Inventory Transactions

1. Click on Manage Inventory under the Inventory section of the menu panel.
2. At the Inventory Alerts screen, press Show Transactions.
3. At the Vaccine Transactions screen, do the following:

- Enter the From and To dates for when the immunizations were entered in VIIS.
- Or, enter the From and To dates for when the immunizations were given.
- Choose a specific user name or All User Names from the User Name pick list.
- Choose a specific transaction type or All Transaction Types. These transactions relate to the Reason pick list on the Edit Vaccine Inventory Information screen.

Transaction types:

Receipt of Inventory (REC): This type indicates vaccines were added as new inventory.
Immunization Given (Immunize): This type indicates vaccines were subtracted from inventory because of immunizations given.
Immunization Deleted (Delete): This type indicates vaccines were added to inventory because they were deleted from a client's record.
Doses Transferred (TRA): This type indicates vaccines were subtracted due to transfer to another site or organization.
Doses Wasted (WAS): This type indicates vaccines were subtracted from inventory because they were wasted through faulty injections, broken vials, improper refrigeration, etc.
Doses *Returned (RET):* This type indicates vaccines were added to inventory after being returned from another site or organization.
Error Correction (ERR): This type indicates vaccines were added or subtracted to correct a previous error or after getting extra or fewer doses from a vial.

- Select the inventory site whose transactions you wish to view or choose All Sites with Inventory.
- Choose the trade name, lot number, public/private, and site from the Trade Name/Lot Number pick list or choose All Lot Numbers from the list.
- Enter the quantity of records you wish to view in the Display Last <#> Records field.

4. Press ***VIEW***
5. The Vaccine Transactions screen will then display.

Vaccine transactions

The top chart on the Vaccine Transactions screen gives the following information:

Site Name:	Vaccines in the table are first sorted alphabetically by site name
Trans Date:	Vaccines are next sorted numerically by transaction date; the most recent transactions are shown first.
Lot/Trade Name:	The lot number and trade name of the vaccine are listed in this column.
Type:	Refer to transaction types in this chapter for an explanation of the transaction codes shown n this column.
Qty:	The number in this column indicates the quantity added to or subtracted from inventory due to the listed transaction.
Client Name:	the client name column indicates the client associated with the transaction, if applicable.
DOB:	The date of birth of the client is indicated in this column, if applicable.

Transaction totals

The chart at the bottom of the Vaccine Transactions screen gives a breakdown of transactions by transaction type.

Trans Code:	This column displays the abbreviated code that identifies the transaction type.
Trans Description:	This column displays the full transaction type.
Trans Count:	This column represents the number of times a particular transaction type was performed within the dates you specified. For example, if your organization received two lots of vaccines within the one-week period for time you specified, the Trans Count would show “2” in the Receipt of Inventory row.

Trans Value: This column shows the quantity of doses added or subtracted by transaction type. For example, if you received a combined 103 doses in the two vaccine lots you added inventory, “103” would show in the Trans Values column on the Receipt of Inventory row.

Printing Inventory Transactions

To print out a list of vaccine transactions, follow these steps:

1. Follow Steps 1 -4 under *Viewing Inventory Transactions.*
2. Click anywhere on the page.
3. Do one of the following:
   - Choose File, then Print, from your browser's menu bar. In the Print dialog box, press OK.
   - Or, press the printer icon on your browser's toolbar.
4. If your printout is cut off, try setting your printer to landscape. To do this:
   - Choose File, then Print, from your browser's menu bar.
   - In the Print dialog box, press Properties.
   - In the Properties box, find the section where you may specify orientation. Choose landscape.
   - Press OK.
   - Press OK in the Print dialog box.

Creating Transfers

VIIS allows you to transfer vaccines between sites within your organization or between two organizations. To create a transfer, follow these steps:

1. Click on Manage Transfers under the Inventory section of the menu panel.
2. Press New Transfer.
3. Enter the following information:
   - The sending site from which you will be taking the vaccine.
   - The internal receiving site or the external receiving organization to which you are transferring the vaccine.
   - Choose between active/no expired or inactive/expired vaccines by clicking the appropriate radio button.
   - The number of doses in the Transfer Quantity field for each of the trade names being transferred.
4. Press ***Save.***
5. Press Packing List or Label, if desired. Press Ship when ready to ship the

vaccines. Either use today's date or enters an alternate date in MMDDYYYY format. Press Ship. The transfer will then be moved to the Outbound Transfer list, where it will remain until it is accepted by the receiving site/organization.

6. To complete an internal transfer without printing shipping documents, press Finish Trans. The ship and receive dates will be set to the current date. The inventory affected by the transfer will be directly added to the internal receiving site's inventory and deducted from the sending site's inventory.

Shipping Documents

If your organization has sent a transfer, you can view and print the packing list and shipping labels associated with the transfer. The packing list and label can be generated immediately after a transfer has been created (see Creating Transfers in this chapter), or by using the following feature:

1. Click on Shipping Documents under the Inventory section of the menu panel.
2. Press Packing List or Label. Print labels and/or packing list, if desired.
3. Enter a ship date if different from today's date, using MMDDYYYY format.
4. Press Ship. Press OK.

Accepting or Rejecting Shipments

Orders and transfers made through VIIS and received by the provider organization must be accepted, rejected, or partially accepted so that VIIS can post and track inventory properly. To accept or reject an order or transfer in VIIS, follow these steps:

1. Click on Manage Transfers under the Inventory section of the menu panel.
2. The Manage Transfer screen categorizes transfers as follows:
   - Outbound Transfer: Displays transfers that are outbound from your organization.
   - Inbound Transfer: Displays transfers that are inbound to your organization.
   - Historic Transfer: Displays completed transfers.

To view the actual order sent to the VDH, click the blue, underlined "Order" Under Type of Transfer.

3. To proceed to the Receive Transfers screen (on which you may accept or reject orders and transfers), click on the date underlined in blue in the Create Date column which corresponds with the transfer you wish to receive.
4. At the Receive Transfer screen, you may accept the entire transfer, Reject the entire transfer, or partially accept some of the transfer, while rejecting the remainder.

Accept transfer:	To accept the entire transfer, press Accept Transfer |, Press OK to accept the transfer and add all transfer items into inventory.
Reject Transfer:	To reject the entire transfer, press Reject Transfer. Select a reason for the rejection: Damaged, Not Wanted, Wrong Vaccine, or Never Received. After selecting a reason, press Reject. Press OK to continue with the rejection and be returned to the Manage Transfers screen.
Partially Accept:	To accept part of the shipment, press Partially Accept. At the Partially Accept Transfer screen, select the amount of the vaccines you wish to accept and a refection reason for those you wish to reflect. Press Save.

Shipping and Restocking Transfers

When an order or transfer has been rejected with a reason code of Not Wanted, Wrong Vaccine, or Never Received, it is necessary to ship and restock transfers in the system so that they are correctly reported in inventory.

Shipping Back a Rejected Transfer

If you are the receiving site of a transfer or order that you reject, you must ship the rejected quantities back to the original sender. To do this, follow these steps:

1. Click on Manage Transfers under the Inventory section of the menu panel.
2. Click on the appropriate transfer date, underlined and in blue, under the Create Date column.
3. Enter a return ship date at the Ship Return Transfer screen by entering the date in MMDDYYYY format. Press Ship.

Accepting a Rejected Transfer

If you are the original sender of a transfer or order, and the receiving organization has rejected the shipment and shipped it back to you, you will need to restock the rejected quantities in the system. To do this, follow these steps:

1. Click on Manage Transfers under the Inventory section of the menu panel.
2. Click on the transfer date of the rejected transfer, underlined and in blue, under the Create Date column.
3. Press Save at the Restock Rejected Transfer screen. The Manage Transfer screen will display, and the transfer will be added to the Historical section of the screen.

Vaccine Usage Reports

The Vaccine Usage Report will give you information on how many doses of each vaccine have been given, by age, within a specified date range. To generate a vaccine usage report for one site or all sites in your organization, follow these steps:

1. Click on Request Vaccine Usage under the Inventory section of the menu panel.
2. At the Vaccine Usage screen, choose a site from the pick list or choose All Sites Combined.
3. In the From field under Report Date Range, choose a starting date for your report using the MMDDYYYY format.
4. In the To field under Report Date Range, choose an ending date for your report using the MMDDYYYY format.
5. Press Generate Report.
6. Press Refresh after a few moments to check the status of your report.
7. Click on the name of your report once it is underlined and displays in blue type.
8. The report displays in Adobe Acrobat Reader®.
9. To print the report, press the printer icon on the Adobe®toolbar.
10. Press OK in the Print dialog box.
11. To return to the Vaccine Usage screen, press the Back button on your browser.

Transaction Summary Reports

The Transaction Summary Report will give you information on how many doses of each vaccine have been given within a specified date range. The report also gives information on how many doses were expired, transferred, received, restocked, wasted, or given in error. To generate a transaction summary report for one site or all sites in your organization, follow these steps:

1. Click on Request Transaction Sum under the inventory section of the menu panel.
2. At the Transaction Summary Report Criteria screen, choose a site from the pick list or choose All Sites Combined
3. In the From field under Report Date Range, choose a starting date for your report using the MMDDYYYY format.
4. In the To filed under Report Date Range, choose an ending date for your report using the MM/DD/YYYY format.
5. Press GENERATE REPORT.
6. The report displays in Adobe Acrobat Reader®
7. To print the report, press the printer icon on the Adobe® toolbar.
8. Press OK in the Print Dialog box.
9. To return to the Transaction Summary screen, press the BACK button on your browser.